



MAR 27 2002 ^{de} 1/20

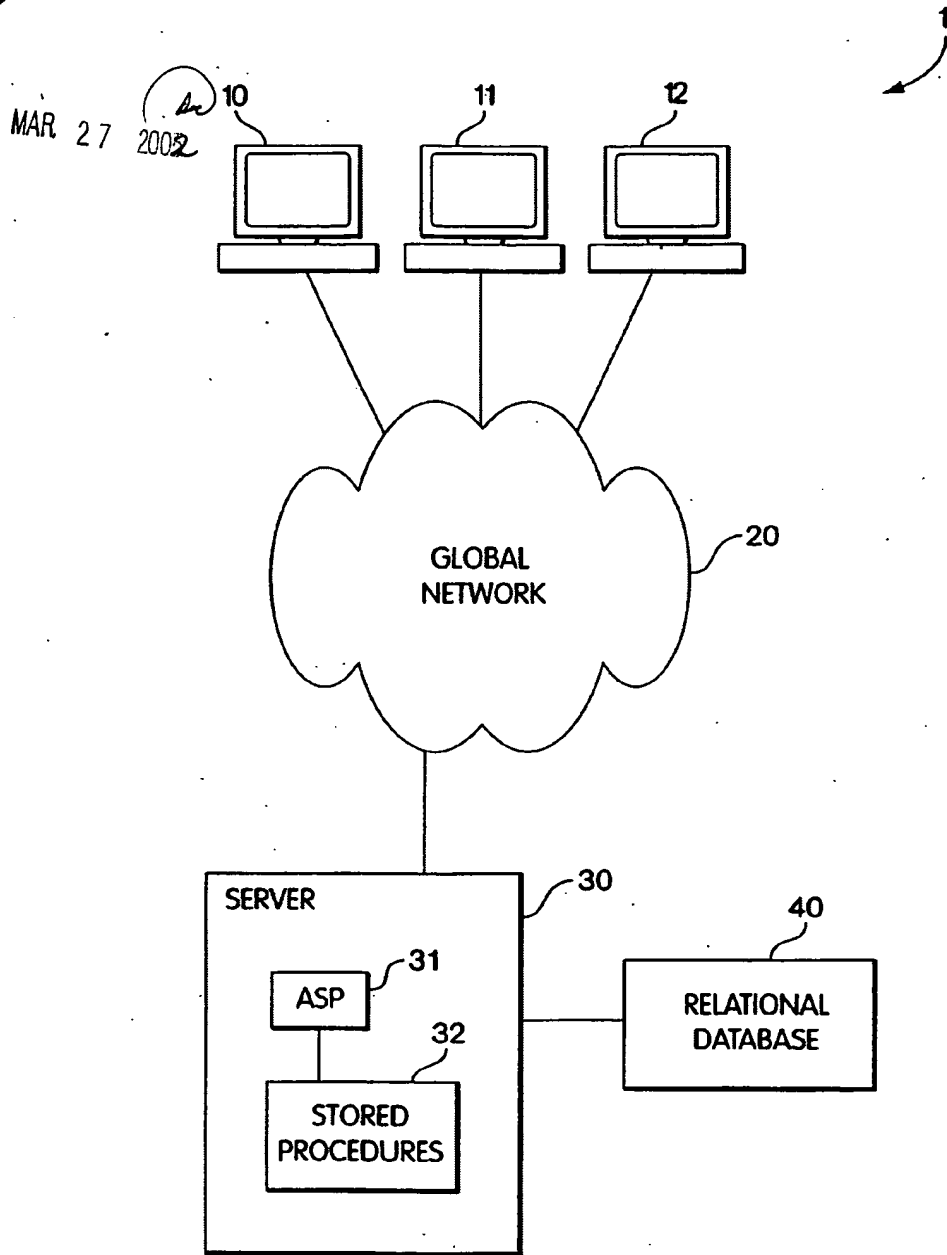


Fig. 1

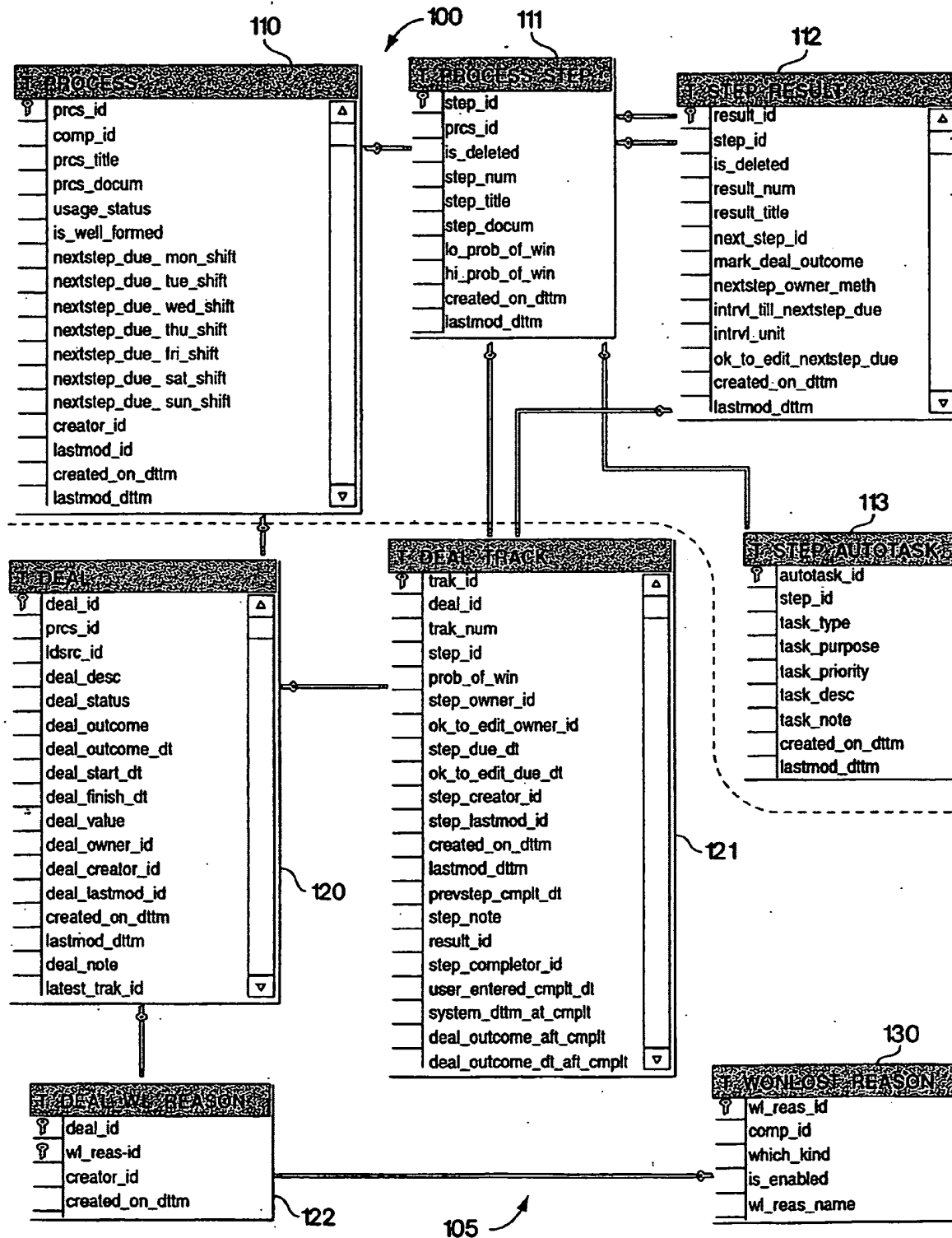


Fig. 2

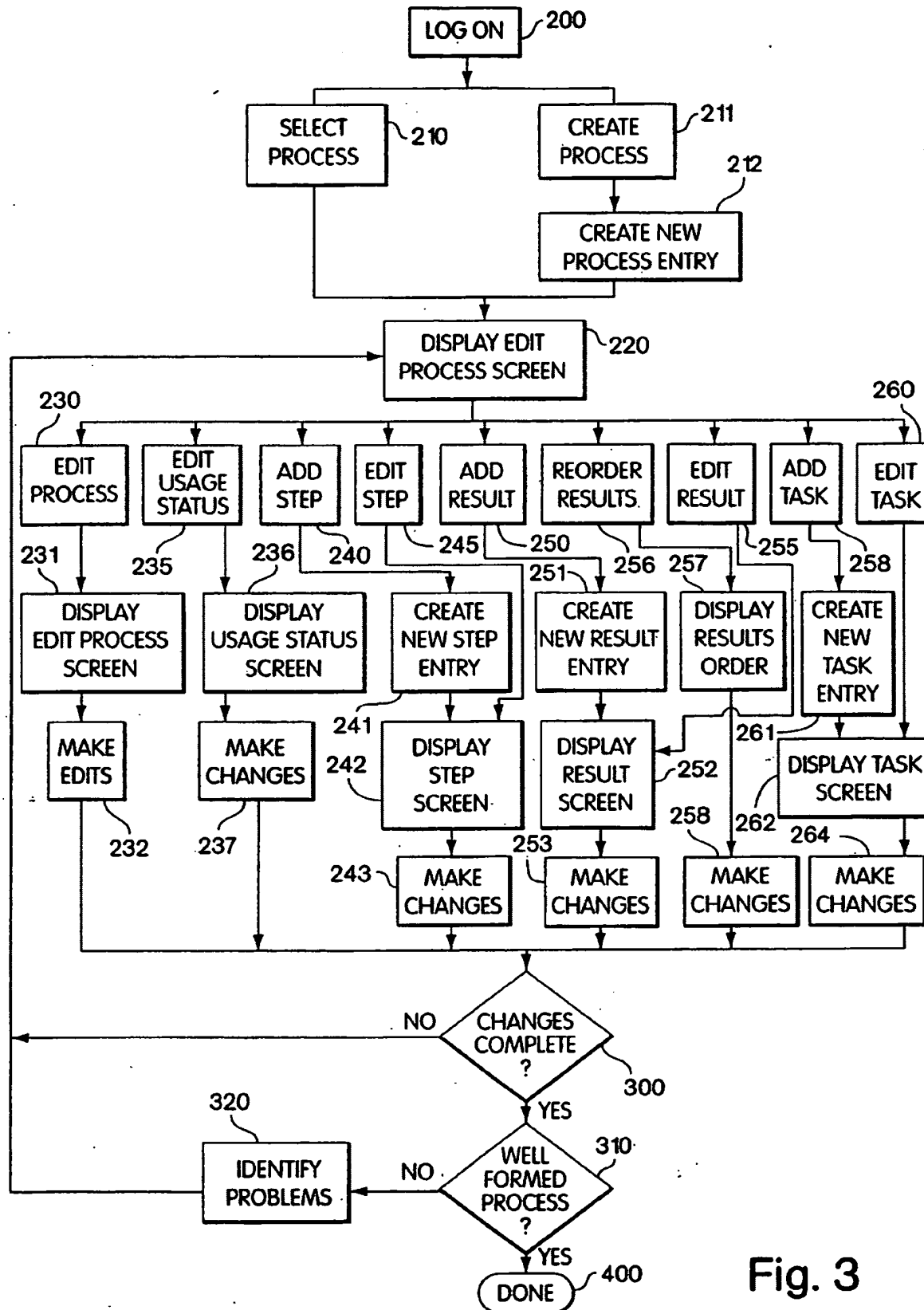


Fig. 3

4/20

511- ② Setup : Process Builder - Edit
 Process Name: Inbound Call (Edit) (A)
 512- Usage Status: Active (Change) (B)

(C)

Add Step

Print View

Copy Process

522

500

510

Step 1: Qualify (0% - 10%)
 520- Results(reorder)
 530- Qualified (F) 535
 532- Not Qualified
 533- Already asked to buy
 540- Auto Tasks
 541- Research company financials (E)

536 (F) Add Result | Add Auto Task

(E)

	Goto	Next Step Due	Next Step Owner	542
	↘ 2	[1 week, Adj]	[User Delegated]	
Lost	↘ 7	[1 week, Adj]	[Current Step Owner]	
Won	↘ 6	[1 week, Adj]	[Current Step Owner]	

Task Type	Task Purpose
	Qualify

Step 2: Contact Prospect (0% - 0%)
 521- Results(reorder)
Phoned - set up demo
Phoned - left message
Faxed
Emailed

Add Result | Add Auto Task

	Goto	Next Step Due	Next Step Owner
	↘ 4	[2 weeks, Adj]	[Current Step Owner]
	↻	[3 days, Adj]	[Current Step Owner]
	↻	[3 days, Adj]	[Current Step Owner]
	↘ 3	[4 days, Adj]	[Current Step Owner]

Step 3: Schedule Demo (10% - 40%)
 Results(reorder)
Scheduled it
Prospect decided not to continue
Auto Tasks
Check prospect's availability

Add Result | Add Auto Task

	Goto	Next Step Due	Next Step Owner
	↘ 4	[2 weeks, Adj]	[User Delegated]
Lost	↘ 7	[1 week, Adj]	[Current Step Owner]

Task Type	Task Purpose
	Phone Call

Step 4: Give Demo (50% - 50%)
 Results(reorder)
Gave demo - interested
Gave demo - not interested
Demo postponed

Add Result | Add Auto Task

	Goto	Next Step Due	Next Step Owner
	↘ 5	[2 weeks, Adj]	[User Delegated]
Lost	↘ 7	[1 week, Adj]	[Current Step Owner]
	↻	[2 weeks, Adj]	[User Delegated]

Step 5: Close Deal (100% - 100%)
 Results(reorder)
Won Deal
Lost Deal

Add Result | Add Auto Task

	Goto	Next Step Due	Next Step Owner
Won	↘ 6	[1 week, Adj]	[Current Step Owner]
Lost	↘ 7	[1 week, Adj]	[Current Step Owner]

Step 6: Fill out win/loss report (won) (100% - 100%)
 Results(reorder)
Done
Not Done

Add Result | Add Auto Task

	Goto	Next Step Due	Next Step Owner
Won	⌞	[Finished]	
	↻	[1 week, Adj]	[Current Step Owner]

Step 7: Fill out win/loss report (loss) (100% - 100%)
 Results(reorder)
Done
Not Done

Add Result | Add Auto Task

	Goto	Next Step Due	Next Step Owner
Lost	⌞	[Finished]	
	↻	[1 week, Adj]	[Current Step Owner]

Fig. 4A

Salesnet - Microsoft Internet Explorer

Setup : Process Builder - Process Properties

Process Properties

Process Name: Inbound Call

Process Description: To handle all incoming calls

Business Day Shifting

Monday:	None
Tuesday:	None
Wednesday:	None
Thursday:	None
Friday:	None
Saturday:	+Mon
Sunday:	+Mon

Save Cancel

Fig. 4B

Salesnet - Microsoft Internet Explorer

Change Process Usage Status

Process Name: **Inbound Call**

Current Usage Status: **Active**

New Usage Status:

☐ Inactive

☒ **Under Construction**

Save **Cancel**

Fig. 4C

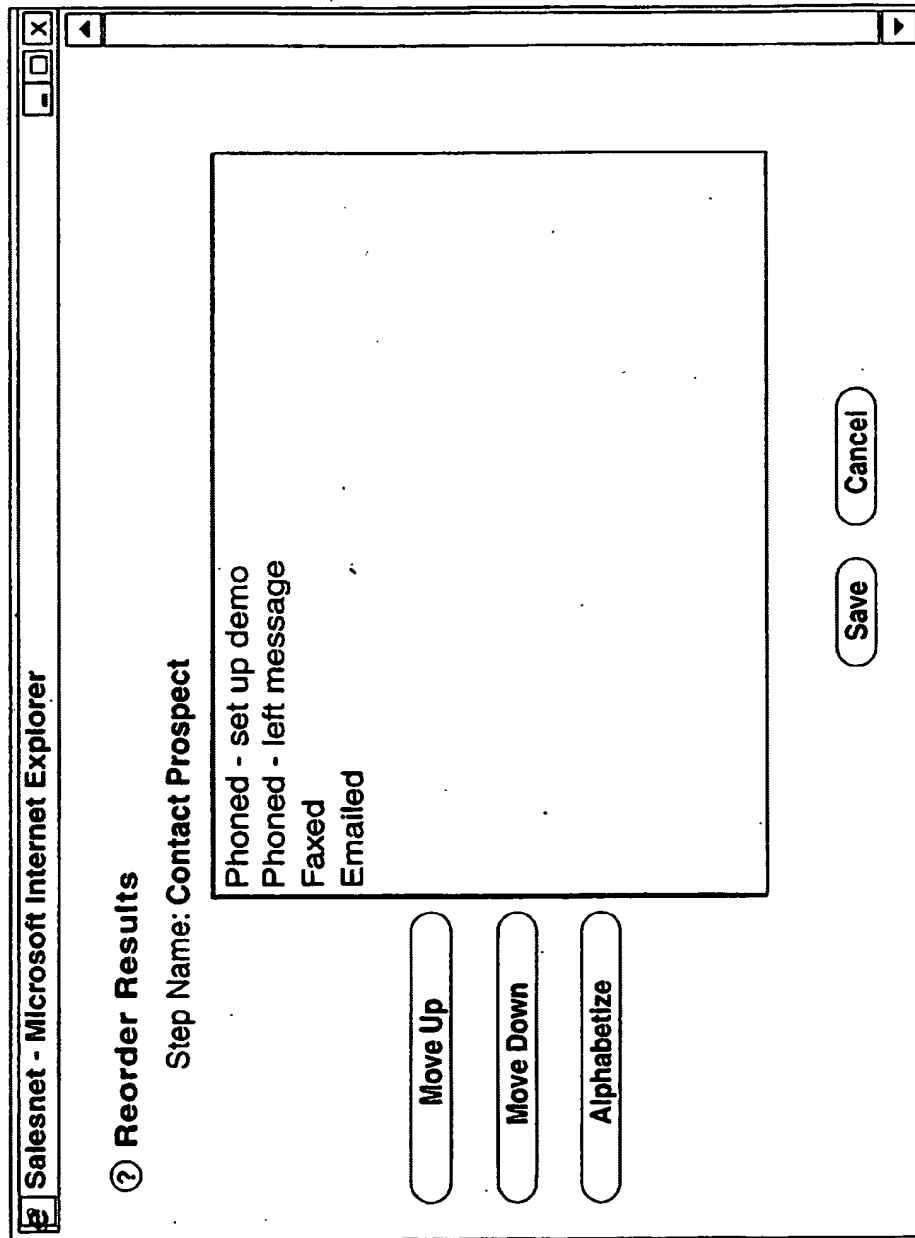


Fig. 4E

Salesnet - Microsoft Internet Explorer

Delete

Edit Auto Task

* Task Description: Research company finan

Task Type: []

Task Purpose: Qualify []

Task Priority: ☒ Normal ☐ High

Task Note: []

☐ Save and Add another Auto Task
☒ Save and Return to Process Builder

Save Cancel

Fig. 4F

Salesnet - Microsoft Internet Explorer

Delete

? Edit Result
Step 1: Qualify

*Result Name: Already asked to buy

Navigation:
☒ Go to Step Step 6: Fill out win/loss report (won) ☐ Mark Deal as Finished

Deal Outcome: ☒ Mark the Deal as Won
☐ Mark the Deal as Lost

Time Interval: 1 Weeks ☒ Allow User to Modify Due Date
(From this Step's Completion Date until the next Step's Due Date)

Next Step Owner: ☒ Owner of the Current Deal Step
☐ Owner of the Deal
☐ Allow User to Delegate the Next Step Owner

☐ Save and Add Another Result
☒ Save and Return to Process Builder

Save Cancel

Fig. 4G

⑦ Setup : Won/Lost Reason Codes

Reasons for Won Deals

Add

		Reason	Status
<u>Edit</u>	<u>Del</u>	Faster	Active
<u>Edit</u>	<u>Del</u>	Smarter	Active
<u>Edit</u>	<u>Del</u>	Stronger	Active

Reasons for Lost Deals

Add

		Reason	Status
<u>Edit</u>	<u>Del</u>	Decided not to commit at this time	Active
<u>Edit</u>	<u>Del</u>	Went with competitor	Active

Fig. 4H

Salesnet - Microsoft Internet Explorer

Edit Won Reason Code

Description:

Status: ☒ Active ☐ Inactive

☐ Save and Add another Reason Code

☐ Save and Return to setup page

☒ Save and Return to Reason Code list

Fig. 4I

② Setup : Activity Types and Purposes

Activity Types

		Types	Status
<u>Edit</u>	<u>Del</u>	Email	Active
<u>Edit</u>	<u>Del</u>	Fax	Active
<u>Edit</u>	<u>Del</u>	Letter	Active
<u>Edit</u>	<u>Del</u>	Phone Call	Active

Add

Activity Purposes

		Purposes	Status
<u>Edit</u>	<u>Del</u>	Qualify	Active
<u>Edit</u>	<u>Del</u>	Whatever	Active

Add

Fig. 4J

Salesnet - Microsoft Internet Explorer

Edit Activity Type

Description:

Status: ☒ Active ☐ Inactive

☐ Save and Add another Type

☐ Save and Return to setup page

☒ Save and Return to List

Fig. 4K

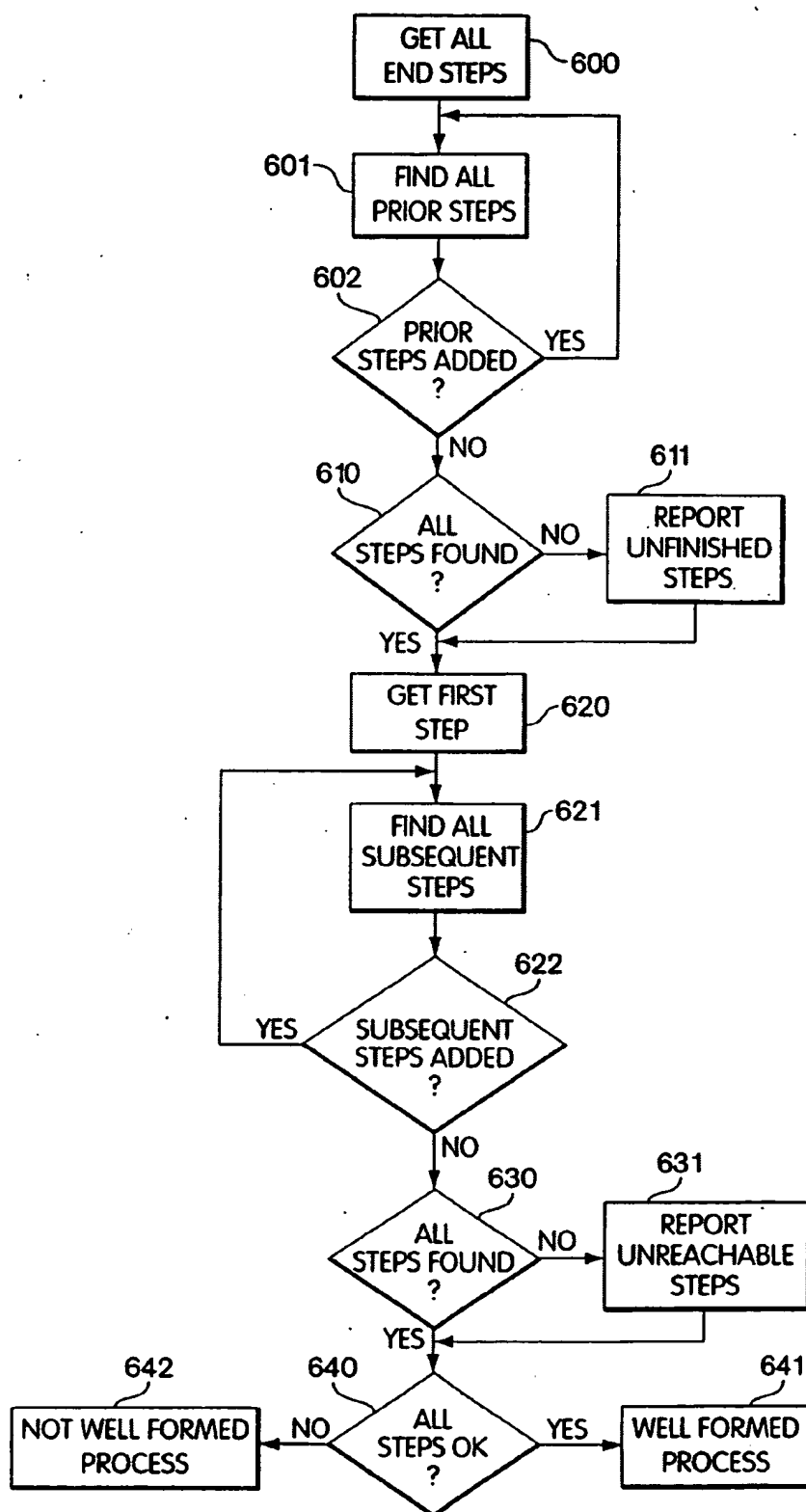


Fig. 5

700

ACCOUNTS
CONTACTS
DEALS
DEAL DETAIL
DEAL STEPS

⑦ El Coloso Deal (#01) (This Deal is Open)

Process: Inbound Call

Primary Contact: Jacob Abbo, 507-271-0555

Complete Current Step

Edit Current Step

Current Step Detail

Step Name: Close Deal Step Owner: O'Connell, Diane

Step Due: 02/14/2001 Step Prob: 100 %

Step Notes:

Deal History

		Completed	Step	Result	Completed By	Prob.	Deal Outcome
edit	undo	02/07/2001	Give Demo	Gave demo - Interested	O'Connell, Diane	50%	
The demo went well. I was informed that a decision should be made by next week.							
edit	undo	01/31/2001	Contact Prospect	Phoned - set up demo	O'Connell, Diane	0%	
Will give demo to 5 decision-makers at their offices							
edit	undo	01/24/2001	Contact Prospect	Phoned - left message	O'Connell, Diane	0%	
edit	undo	01/17/2001	Quality	Qualified	O'Connell, Diane	10%	

Fig. 6A

740

ACCOUNTS

CONTACT

① El Coloso Deal (#01)

Process: Inbound Call

Primary Contact: Jacob Abby

Current Step Detail

Step Name: Close Deal

Step Due: 02/14/2001

Step Notes:

Deal History

	Completed
<u>edit</u> <u>undo</u>	02/07/2001
	The demo was
<u>edit</u> <u>undo</u>	01/31/2001
	Will give dem
<u>edit</u> <u>undo</u>	01/24/2001
<u>edit</u> <u>undo</u>	01/17/2001

Salesnet - Microsoft Internet Explorer

Complete Current Step

Deal: El Coloso Deal (#01) (This Deal is Open)

Current Step: Close Deal

Current Step Owner: O'Connell, Diane

Step Completion Date: 02/15/2001

Step Result: Won Deal

Notes:

Next Step Detail

Next Step: Fill out win/loss report (won)

Owner of Next Step: O'Connell, Diane

Due Date of Next Step: 02/22/2001

Probability of Winning: 100 %

The Deal Outcome will be 'Won'

Select one or more reasons, if applicable:

Faster

Smarter

Stronger

Save

Cancel

741

Notes

745

Fig. 6B

Salesnet - Microsoft Internet Explorer

ACCOUNTS CONTACTS

⑦ El Coloso Deal (#01) (This Deal)
 Process: Inbound Call
 Primary Contact: Jacob Abbo, 507-271-

Current Step Detail
 Step Name: Close Deal
 Step Due: 02/14/2001
 Step Notes:

Deal History

Completed	edit	undo	02/07/2001	The demo went well. I w
edit	undo	01/31/2001	Will give demo to 5 decision-makers at their offices	0%
edit	undo	01/24/2001	Contact Prospect	0%
edit	undo	01/17/2001	Quality	10%

⑦ Edit Current Step
 Step: Close Deal
 Due Date: 02/14/2001
 Step Notes:

Owner: O'Connell, Diane

Save Cancel

Hide Notes

Outcome

Contact Prospect **Phoned - sat up demo** **O'Connell, Diane** **0%**

Contact Prospect **Phoned - left message** **O'Connell, Diane** **0%**

Quality **Qualified** **O'Connell, Diane** **10%**

Fig. 6C

ACCOUNTS CONTACTS DEALS DEAL DETAIL DEAL STEPS

② El Coloso Deal (#01) (This Deal Is Open)

Process: Inbound Call
 Primary Contact: Jacob Abbo, 507-271-0555

Current Step Detail

Step Name: Close Deal Step Ow
 Step Due: 02/14/2001 Step P
 Step Notes:

Deal History

	Completed	Step	Deal Outcome
<u>edit</u> <u>undo</u>	02/15/2001	Close Deal	100% Won
<u>edit</u> <u>undo</u>	02/07/2001	Give Demo	50% Won
The demo went well. I was informed that a decision should be made by next week.			
<u>edit</u> <u>undo</u>	01/31/2001	Contact Prospect	0% Won
Will give demo to 5 decision-makers at their offices			
<u>edit</u> <u>undo</u>	01/24/2001	Contact Prospect	0% Won
<u>edit</u> <u>undo</u>	01/17/2001	Qualify	10% Won

Hide Notes

Salesnet - Microsoft Internet Explorer

Undo Confirmation
 This will make Close Deal the current step. Any information you logged for this step will be deleted.

OK Cancel

Fig. 6D

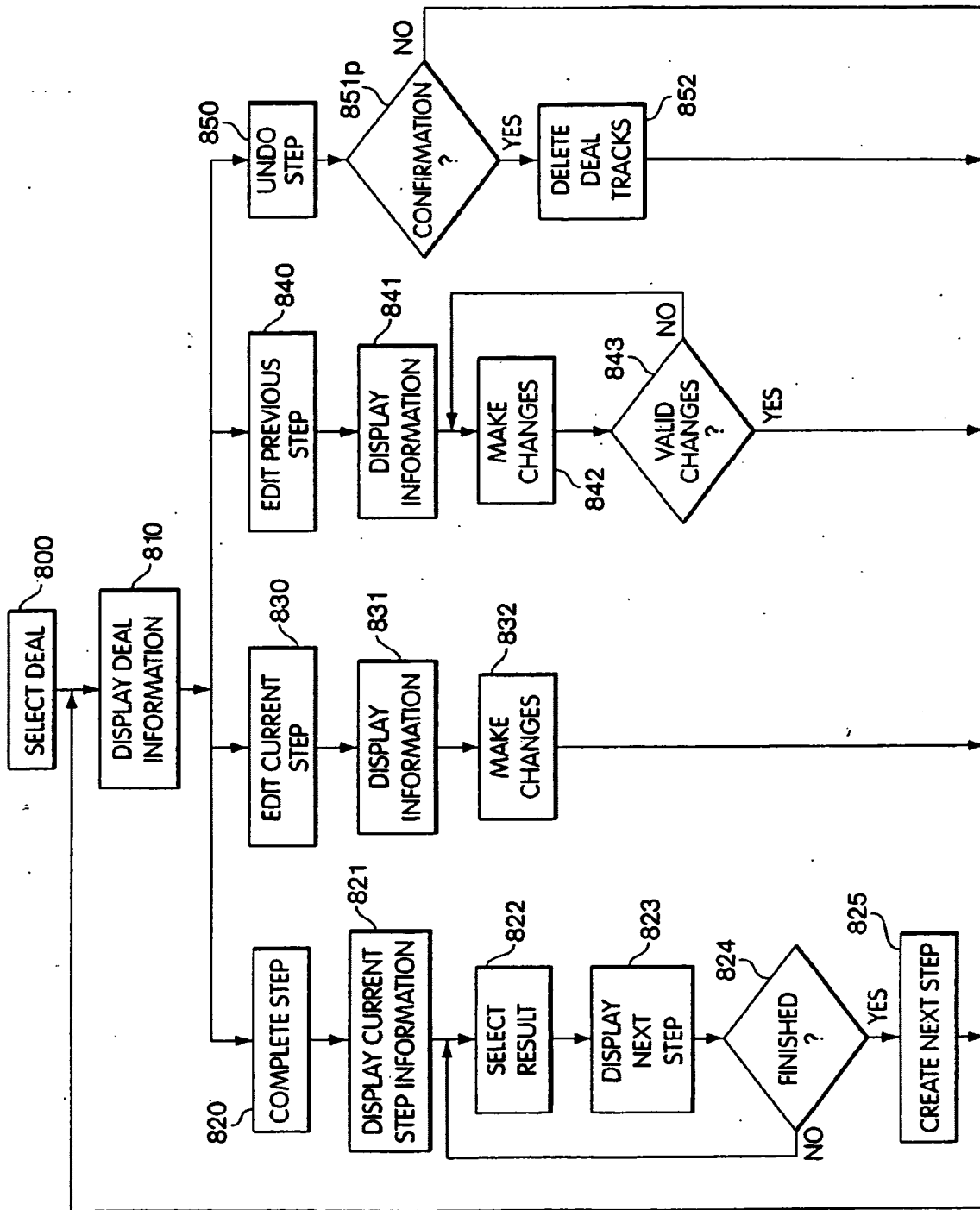


Fig. 7